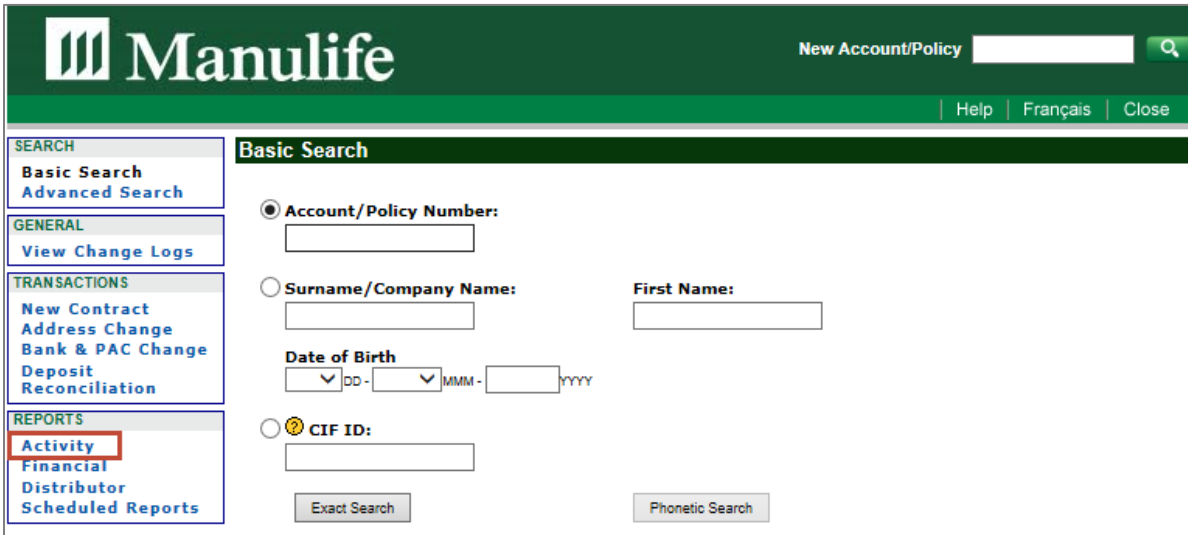


My Clients reporting

Payment method summary report

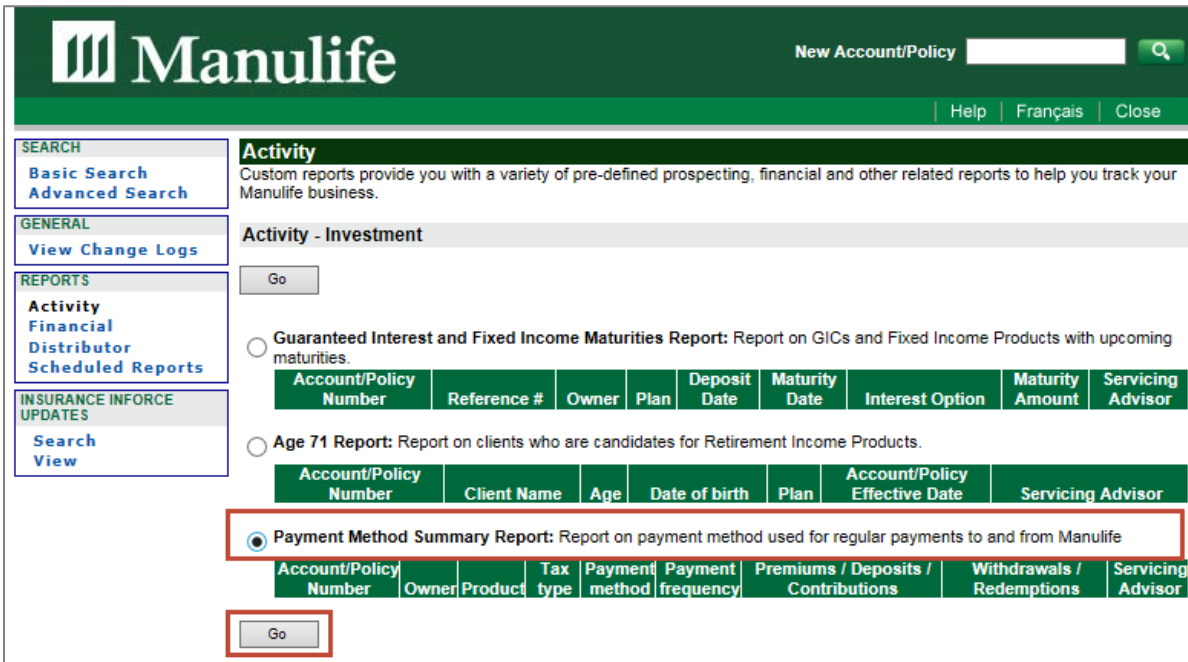
Within **My Clients**, you can generate a report that highlights the various payment methods that your clients are using for active insurance policies and investment contracts/accounts. To generate the report, follow the steps below:

Step 1: Once logged into **My Clients**, select **Activity** from the **Reports** menu.



The screenshot shows the Manulife web interface. On the left sidebar, under the 'REPORTS' section, the 'Activity' link is highlighted with a red box. The main content area is titled 'Basic Search' and contains several search criteria: 'Account/Policy Number', 'Surname/Company Name' with a 'First Name' field, 'Date of Birth' (with dropdowns for DD, MMM, and YYYY), and 'CIF ID'. There are 'Exact Search' and 'Phonetic Search' buttons at the bottom.

Step 2: In the **Investments** or **Life and Living Benefits** section, select **Payment Method Summary Report** and then select **Go**.



The screenshot shows the 'Activity - Investment' section of the Manulife web interface. Under the 'Activity' heading, there is a description: 'Custom reports provide you with a variety of pre-defined prospecting, financial and other related reports to help you track your Manulife business.' Below this, there are three report options, each with a 'Go' button. The 'Payment Method Summary Report' option is highlighted with a red box, and its corresponding 'Go' button is also highlighted with a red box.

Payment Method Summary Report: Report on payment method used for regular payments to and from Manulife

| Account/Policy Number | Owner | Product | Tax type | Payment method | Payment frequency | Premiums / Deposits / Contributions | Withdrawals / Redemptions | Servicing Advisor |
|-----------------------|-------|---------|----------|----------------|-------------------|-------------------------------------|---------------------------|-------------------|
|-----------------------|-------|---------|----------|----------------|-------------------|-------------------------------------|---------------------------|-------------------|

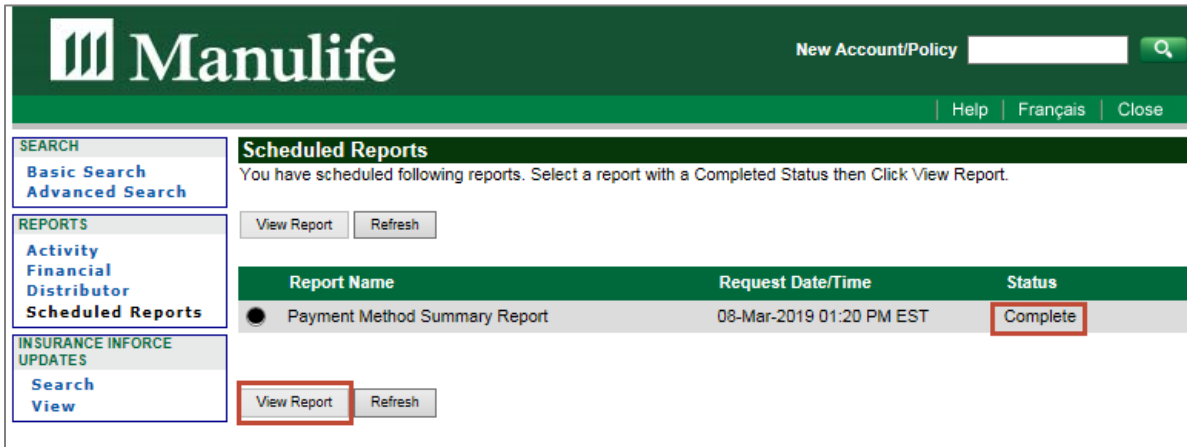
- Step 3:** In the **Common** section, select the **Line of Business, Report Format** and **Language** preference.
- Step 4:** **For back offices only:** Reports may be generated for a specific advisor. Enter the **Advisor name**, click **Find Advisor** and proceed to step 5.
- Step 5:** Select the advisor's name and click **Add**. You can add more names to the list box by following the same process.
- Step 6:** Select **Schedule Report**.

- Step 7:** The report will then be added to your list of **Scheduled Reports**. The status will show as **Pending**. Depending on the number of results, it could take a few minutes to generate the report.

| Report Name | Request Date/Time | Status |
|-------------------------------|--------------------------|----------|
| Payment Method Summary Report | 08-Mar-2019 01:20 PM EST | Pending |
| Payment Method Summary Report | 21-Feb-2019 08:55 AM EST | Complete |

Step 8: Click **Refresh** to reload this screen and check the status of the report.

Step 9: Once the status has changed to **Complete**, select the report name and click **View Report**.



Manulife New Account/Policy

Help | Français | Close

SEARCH
[Basic Search](#)
[Advanced Search](#)

REPORTS
[Activity](#)
[Financial](#)
[Distributor](#)
Scheduled Reports

Scheduled Reports
 You have scheduled following reports. Select a report with a Completed Status then Click View Report.

| Report Name | Request Date/Time | Status |
|---------------------------------|--------------------------|-----------------|
| ● Payment Method Summary Report | 08-Mar-2019 01:20 PM EST | Complete |

INSURANCE INFORCE UPDATES
[Search](#)
[View](#)

Please note: The payment method summary report will only display one PAC per client. If your client has multiple active PAC's, please review My Clients for further details.